

Conference Notes - CAIS/CostWorks User Meeting

March 18-20, 2008 - Las Vegas, Nevada

Meeting Date: March 18, 2008

Note that all presentations will be posted at <http://65.216.217.69/sofdoc.htm>

The conference started with each site represented providing a status of their condition assessment programs.

Gary Hoe – Sandia National Lab / Condition Assessment and Reporting of Sheds and Trailers

- Gary gave a provocative presentation regarding inspections of sheds and trailers.

EES – Ruth Ann Smith / CAIS and CostWorks Status

- Ruth Ann made a presentation on CAIS and CostWorks accomplishments (from December 2007 to March 2008).

DOE Headquarters – Gary Horn / Headquarters News Items

- Reviewed new organizational changes at OECM.
- Reviewed President's Management Agenda (PMA) scorecard for DOE.
- Discussed Sustainability and the LEED Gold initiatives.

EES – Ken Baker and Ken Rowe / CAIS History

- The Kens gave an excellent account regarding the history of CAIS from 1991 to present.
- Ken Rowe noted that Chuck Siegfried from Parsons Brinckerhoff has been instrumental in supporting the various data conversions, other engineering related topics and for providing CAS inspection training over the life of the project.

NNSA News Items – John Bauckman (NNSA/NA-52)

- John was unable to attend. Ken Rowe read his slides to the group.
- Jessica Arcidiacono will be replacing John for the interim or until notified otherwise.
- The slides covered the TYSP and excess space elimination.

Y12 Site Report: CAIS Deficiencies vs. Maintenance Backlog– Jane Nations

- Jane reviewed the status of the CAIS deficiencies.
- Jane explained how she linked their SAP work order system to the CAIS database.
- Jane noted that they need to closely monitor their data to keep duplicate entries from being created.

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Pantex Plant and CostWorks Sustainment Models – Steve Patterson

- Steve gave an overview of how Pantex is using CostWorks to generate customized Sustainment Models for their assets.
- Steve has completed models for 22 of his critical facilities. He believes that these customized models provide a higher level of accuracy for reporting purposes and funding requests.
- Steve used MS Access queries to align his CostWorks sustainment model with his CAIS inventory quantities for important systems. This alignment was done in the Estimator Excel spreadsheet. Using the CAIS inventory data, Steve created a simple method to update the sustainment model. This approach works for Pantex since they use CAIS as an inventory system for their assets.
- Ken Baker mentioned and Gary Horn agreed that there can be two distinct models that can be generated in CostWorks. The RPV model would be based on a structure of comparable size using codes, technology, standards, materials and green assemblies. The sustainment model could be unrelated to code compliance, technology and green assemblies and represent the characteristics of the existing asset as much as possible. The RPV does not impact sustainment estimates.

Notes from various discussions:

- Steve Patterson noted that with CAIS, Pantex puts all CAS inspected items into the CAIS database. For example they input all of their chillers (e.g. they use CAIS as an inventory type system for their Real Property Assets).
- Dennis Chew noted that if your CAS program is integrated with your preventive maintenance program, there would be certain synergies. For example, if a pump is scheduled for replacement within one year, you might skip preventive maintenance tasks for that item.
- Steve explained that he uses a cost adder factor generated from CAIS to adjust the costs in CostWorks for projects so that the costs developed in CostWorks, more closely aligns with CAIS costs.
- Meeting attendees agreed that inflation costs are making it difficult work to achieve the desired DM buy-down results.
- Jerry Bingham from INL requested that we rename Inspection Date on the Asset Detail screen of CAIS to CAS Inspection Date.
- NTS inspectors noted that they were working on load balancing their schedule.
- Jerry Bingham noted that it was difficult to inspect certain OSFs.
- Milt West noted that trailers are Real Property Assets and not Personal Property.
- Ed Lee noted that at ORNL facilities engineers are responsible for conducting condition assessments.
- Gary Horn , DOE/MA-50 (OECM), noted that it would be useful if the Models were updated to conform to the LEED Gold standard. Gary stated that monetary costs for green buildings do not address the entire picture.
- Bob Gair (RS Means) suggested that we use an industry accepted factor of roughly two percent so that the existing models reflected the LEED Gold standard.

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- Bob stated that 40% of the carbon produced comes from activities related to buildings.
- Pantex is evaluating the possibility of moving from Passport to PeopleSoft regarding their work orders and PMs.

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Bob Gair – RS Means & Ken Rowe – EES / RS Means Green Costs

- Bob showed how the Green Costs have been added to CostWorks.
- Ken Rowe explained that 900 of these costs have been added to CAIS.
- Bob noted that adding green costs to CostWorks is an ongoing process and that additional items and assemblies will be added in the coming years.

Ken Rowe - EES / CAIS Enhancements

- Ken Rowe handed out the top five enhancement requests that are not done.
- Marilyn Overman noted that the navigation/layout of the IU list still needs to be improved.
- Ken asked that all sites submit an updated top five enhancement list by April 11th, 2008.
- The entire list of enhancements will be added to CAIS web

Ken Baker-EES / CostWorks Enhancements

- Ken Baker passed out a spreadsheet to the group on proposed CostWorks enhancements.
- The enhancements that garnered the most support were the portfolio module and the graded approach tasks. Using a graded approach buildings in a shutdown status will have sustainment estimates based only on roofing systems. The graded approach task must be completed before completing the portfolio module.
- Steve Patterson's suggested enhancements need to be discussed in more detail following this conference and ranked for priorities along with the other enhancements at a future monthly conference call.
- RS Means has many enhancements under study to estimate and propose a delivery date. A revised enhancement list has been added based on comments from the user group. See the CostWorks enhancement table.

Dennis Chew / Availability of CAS Information to Livermore users

- Dennis Chew gave a presentation on the availability of CAS information to Livermore users.

Debbie Etheredge – SRS / Managing and Retrieving CAIS Data using MS Access

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- Debbie demonstrated how SRS uses MS Access to report CAIS data.

Robert Gair – RS Means/ Construction Industry Trends

- Bob gave an update on construction activity and costing trends. His projection for wages in the private sector were 3.3% and in the construction trades 5%. Construction materials costs increases are projected at 4-6%. These inflation rates are available for sites to use in the sustainment summary table.

Steve Patterson – Pantex / Building DM projects in CostWorks and how they can correlate with CAIS Projects

- Steve gave a walk-through of how he creates project estimates using CostWorks.

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Steve Patterson – CostWorks Report Customization

- Steve gave a demonstration of how reports can be customized in CostWorks.

User Group Charter Amendments

- We had an excellent discussion and the charter has been updated accordingly.

Debbie Etheredge – Field Data Collection Sheet

- Debbie showed the sheet she wants to use with the engineers at SRS and the fields that she has marked as required for entry into CAIS. She received valuable input from everyone on how to approach her daunting task.
- Billy Ray suggested that Debbie add the RS Means Line number to the field data collection sheet. He also recommended the use of the Favorites feature in CAIS for commonly occurring deficiencies.
- Billy Ray also suggested that two more lines get added to the inspection sheet for deficiencies. If there are not enough lines for the deficiencies, the inspectors may start lumping multiple deficiencies together on one line.
- Billy Ray explained that it is helpful for inspectors to become familiar with the standard deficiencies for each type of system so that the database and the field data collection sheets have matching deficiency descriptions. This will make for a smoother data validation process.
- Gene Buck emphasized that by using the notes field, you get a better explanation of why the item being inspected is a deficiency and the more information that is gathered the better the understanding will be of what actually occurred

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- Gene Buck noted that when you have engineers conduct CAS inspections, you need to clearly explain what you expect them to do. A CAS inspection is not to be confused with a design study. It is not an estimate.
- Dan Soper noted that CAS inspections need to be consistent and repeatable. It was suggested that the engineers review the deficiencies in CAIS so they know the terminology.
- Gene Buck noted that the original 12 CAS inspection manuals are still very useful.
- Steve Patterson noted that to keep the inspection simple and streamlined, it is helpful to use a standardized inspection sheet.
- Gene, Billy Ray and Steve all agreed that using a pilot building to baseline the inspection process is invaluable.

CAIS Training Needs

- INL needs to have one inspector trained for CAIS.
- The engineers at SRS may be interested in CAIS Training.
- There was a discussion about possibly using current Condition Assessment Group members to provide inspection training to new CAIS users and CAS inspectors.
- It was agreed that the group would review and provide input for updating the existing inspector training slide presentation.

Next User Conference

- Gary Horn suggested that there should be a Condition Assessment Group meeting every six months to discuss ongoing requirements changes. He feels the sites continue to demonstrate and exchange invaluable information with one another at these meetings regarding better ways to manage our nation's assets where CAS inspections, CAIS data management, Sustainment calculations, RPV's, and deferred maintenance reporting are concerned.
- The next conference will be in October.
- Las Vegas is the most likely location.

Future Topics for User Group Study/Discussion

- Request site users to report model systems that have unusual quantities that are different from actual asset quantities.
- Draft CostWorks RPV and sustainment model development guidance for users to follow in creating their models. The guidance could be used for creating two distinct models for estimating RPV and sustainment costs.